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ABSTRACT

This guide provides information on funding resources for supported employment in Montana. Supported employment provides individuals with severe disabilities the tools necessary to enter into an integrated work setting at a competitive wage. Supported employment generally consists of the professional expertise of a job coach, job development strategies, on-site training, and on-going support for continued employment. This guide overviews resources available for long-term supported employment, including Social Security programs such as Supplemental Security Income, Social Security Disability Income, and Social Security work incentive programs; Department of Veterans Affairs; Rural Institute on Disabilities; Rehabilitation/Visual Services Division of the Montana State Department of Social and Rehabilitation Services; Developmental Disabilities Division of the Montana Department of Social and Rehabilitation Services; Montana's Home and Community Based Medicaid Waiver Program; Mental Health Services; Montana Department of Labor and Industry; state unions; Montana Office of Public Instruction; and private fund raising, grants, and foundations. Descriptions include services available, benefits, and eligibility criteria. Also includes a list of contact information for various agencies and a glossary. (LP)

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The Funding Book

**Rural Supported Employment
Resources for Montana**

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THE FUNDING BOOK

Rural Supported Employment Resources for Montana

The Montana Supported Employment Development Project
Montana University Affiliated Rural Institute on Disabilities

THE UNIVERSITY OF MONTANA
MISSOULA, MONTANA

September 1994

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INTRODUCTION

Supported Employment provides individuals with severe disabilities the tools necessary to enter into an integrated work setting at a competitive wage. It is predicated on a commitment by the individual, the provider of services and the employer to a long-term support network. Supported Employment offers the individual an intense, individualized system of supports. The professional expertise of a job coach is generally used for job development, on-site training and on-going supports necessary for continued employment.

This publication is for use by individuals, providers, job coaches and employers who are attempting to access Montana's funding system for supported employment. The system is frequently encumbered by complex forms, rules and regulations. This publication is intended to discuss the funding sources and allow the consumer access to the numerous systems. The sources of funding that are noted have been summarized and simplified for a brief review of each of the programs. Each individual should contact the program directly through the "contacts" at the end of this book (or use his/her vocational rehabilitation counselor, case manager or social worker for assistance) in determining their qualification for the program.

Supported Employment is a significant part of a holistic approach to assisting an individual with a severe disability. Although employment or re-employment can be a major factor in the assistance provided to an individual with a severe disability, it is not the only support needed for total integration into the community. Other programs not discussed in this book including socialization, recreational and independent or supported living programs may be necessary for an individual's successful employment.

We hope the information provided in this book will enhance individuals' ability to access funding for supported employment. Our other hope is to provide these individuals with the information necessary to find the system which will provide them with the best opportunities for employment. We are working toward the goal of allowing the individual to make his/her own choices within an expanded supported employment system in Montana.

Resources Available for Long-Term Supported Employment

SOCIAL SECURITY

(NOTE: In this section the terms "disabled" and "blind" refer to specific medical and legal definitions established under Social Security law. They include the physical/mental condition(s) as well as the ability to perform the work for which one is suited. We have avoided the use of terms like "the disabled" elsewhere, preferring "people first" usages such as "individual with a disability" or "people with disabilities. Here, however, we have left these medical/legal terms in place.)

Supplemental Security Income

SSI stands for Supplemental Security Income. SSI is the federal government's needs-based assistance program for the elderly, and for blind and disabled people. Although it is administered by Social Security, all funds used for SSI come from general federal tax revenues; no Social Security or FICA taxes are used for SSI.

To get SSI, individuals must be age 65 or older or blind or disabled. Blind means individuals are either totally blind or have very poor eyesight. Disabled means individuals have a physical or mental problem that keeps them from working and is expected to last at least a year or result in death. Children as well as adults can get benefits because of disability or blindness.

In Montana in 1994 individuals can receive up to \$446 a month in SSI benefits. However, if they have any other income, it is subtracted from the base of \$446 before they get their SSI check. The first \$20 of most income received in a month, is not counted, as well as the first \$65 a month earned from working and half the amount over \$65. Additionally food stamps, most food, clothing or shelter received from private nonprofit organizations is not counted.

In determining eligibility for SSI, the Social Security Administration also looks at what individuals own, or their resources. Social Security considers items such as real estate, personal belongings, bank accounts, cash, and stocks and bonds. A person may be able to get SSI while owning items worth up to \$2000. A couple can have resources worth up to \$3000. If individuals own property or another resource that they are trying to sell, they may be able to get SSI while selling it. And Social

Security does not count the home lived in and the land it is on, a car of reasonable value, burial plots for individuals and members of their immediate family, and most personal and household goods, depending on their value.

For many people, especially those needing expensive medical treatment, a big advantage to getting SSI is that they are also eligible for Medicaid. Medicaid helps pay for doctor and hospital bills and for prescription drugs.

If you have questions about SSI or think you or someone you know might be eligible for SSI, call the Social Security Administration toll-free at 1-800-772-1213. Do not delay calling because SSI cannot start before the day you contact Social Security.

Social Security Disability Income

What would happen to a person and his/her family if that person became disabled, couldn't work, and couldn't support his or herself? Disability is something most people don't like to think about, but Social Security cites that one out of four young workers will become disabled sometime during their lifetime. More than 10,000 Individuals in Montana are disabled and qualify for Social Security Disability Income benefits to help with their living expenses.

Social Security disability benefits are paid to individuals who are unable to do any kind of work for which they are suited, when that condition is expected to last for at least a year or to result in death. Social Security Disability Income is not paid for partial disability or for short-term conditions.

To qualify for benefits an individual must have worked long enough and recently enough under Social Security. For example, in 1993 an individual earned one credit of SSDI coverage for each \$620 in earnings, up to a maximum of four credits per year. The number of work credits needed for disability benefits depends on the age when the person becomes disabled. Before age 24, you need 6 credits in the 3 year period ending when your disability starts. Between age 24 and 31, an individual needs credit for having worked half the time between 21 and the time that person became disabled. For example, if an individual became disabled at age 27, that person would need credit for 3 years of work out of 6 years. At age 31, generally an individual must have earned at least 20 credits in the ten years prior to becoming disabled.

If individuals are unable to work, they should contact Social Security about filing a claim. They will ask about the individuals' medical condition, where they have been treated, and what kind of work they have done in the past. Next, trained disability evaluation specialists at the Montana Disability Determination Bureau in

Helena will secure medical records, review the information, and make a decision on the case. If they need more information, they may schedule a medical examination at no expense to the individual.

If the individual meets the disability requirements prescribed in the law, he/she will receive the first Social Security Disability Income check dating back to the sixth full month following the onset of the disability. No payments can be made for the first five months the person is unable to work. The amount of the benefits are based on how much individuals earned and paid Social Security taxes during their working lifetime.

If the claim is denied, the person may appeal the decision. It is important to contact the Social Security office for help immediately because individuals have only 60 days from the time they receive the decision to file an appeal.

Phone Social Security **toll-free at 1-800-772-1213** or go to your local Social Security office.

Working While Disabled: Social Security's Work Incentives

If individuals are receiving Social Security Disability (SSDI) benefits or Supplemental Security Income (SSI) benefits but still want to work, there are special provisions in the law called "work incentives." These "work incentives" allow them to test their ability to work, even though they are still disabled, and which ease their transition into the work force.

The work incentives are different for SSDI and for SSI, so depending on what type of benefit received, individuals will have different rules for helping them succeed in the work force.

Social Security Disability (SSDI) Work Incentives

Trial Work Period: Individuals can usually have a trial work period of nine months during which their benefits will not be affected by their earnings regardless of how much they earn. A trial work month is any month in which they earn more than \$200 or, if they are self-employed, they earn more than \$200 or spend more than 40 hours in their own business. The nine months of trial work must fall within a sixty month period. At the end of the nine months of trial work, Social Security reviews their work activity to see if their earnings are "substantial." Generally, \$500 per month is considered "substantial." If their earnings are substantial, their benefits would continue for three more months and then stop.

Extended Period of Eligibility: At the end of their trial work period, if they are still medically disabled and continue to work in spite of their disability, their benefits can be reinstated anytime during the next 36 months. During this time, they will receive their full Social Security benefit for any month their earnings fall below \$500. Benefits would continue as long as they remain disabled and their earnings do not exceed \$500 a month. Individuals do not have to reapply for benefits or serve a "waiting period." (Note: Individuals would receive benefits if their income dropped below \$801/month if the disability is blindness.)

Continuation of Medicare: Medicare coverage will continue through the trial work period and for an additional 39 months if the person is still disabled. Coverage continues even for those months in which earnings are too high to receive a check. When Medicare coverage runs out after the 39 months and if the person is still disabled, the individual may purchase the same coverage for a monthly premium.

Impairment-Related Work Expense: Work expenses related to the disability are deducted from earnings before Social Security determines continued eligibility for benefits. These expenses may include the cost that individuals pay for themselves for any item or service needed to work, even if the item or service is also useful to individuals in their daily living. Examples include a seeing eye dog, prescription drugs transportation to and from work, a job coach, or specialized work equipment or medical devices.

Supplemental Security Income (SSI) Work Incentives

Continuation of SSI: The amount of the SSI check is based on how much other income individuals have. When other income goes up, the SSI check usually goes down. When earnings push income over the SSI limits, the SSI checks will stop for that month. They will start again without a new application for any month in which income drops below the SSI limits.

If the individual's only other income besides SSI is the money made from his/her job, the first \$85 in earnings received each month is not counted. One-half of what individuals earn over \$85 is then deducted from their SSI check. If individuals have other income besides earnings, for example a Social Security check, the first \$65 in earnings each month does not count. One-half of what individuals make over \$65 is deducted from their SSI payments. Twenty dollars of individuals other income, such as their Social Security check does not count either.

If individuals have no other income besides earnings, they may earn up to \$977 a month in 1993 before losing their entire SSI benefit. If they have other income, the amount they can earn before losing their SSI payment may be lower.

Continuation of Medicaid Eligibility: Medicaid coverage will usually continue even if individuals earn over the SSI limits and are not eligible for a check. They must continue to be disabled, need Medicaid in order to work, and be unable to afford similar health insurance coverage.

Impairment-Related Work Expenses: These rules are the same as for SSDI benefits. Work expenses related to work and paid by the individuals are deducted from your earnings before the amount that will affect their SSI check is figured.

Plan for Achieving Self- Support (PASS): A PASS permits individuals to put aside money or assets toward a plan designed to help them support themselves; the goal of the plan may be to obtain training for a job, to build up assets for special equipment or to start a business. The money set aside will not reduce SSI payments or affect eligibility. If individuals have too much income or resources to get SSI, they may set aside the necessary income and assets to accomplish a work goal and these funds will not count when Social Security decides if they are eligible for SSI or how much SSI they receive. In general the following rules apply:

The PASS must state a clear and realistic work goal that individuals can expect to achieve with their disabling condition. The goal must be a job, so individuals should think about what you are interested in doing and what job they think they will be able to do at the end of plan.

The PASS must state the amount and sources of income or resources that will be set aside and used in the PASS.

The PASS must state how individuals will spend the money and how they will account to Social Security for the expenditures. They must be able to achieve the goal of the PASS within a specified period of time. Generally, a PASS is limited to 18 months, but may be extended up to 48 months, depending on the goal.

The PASS must be in writing and approved by Social Security. A PASS may be used to pay for almost any expenses that will help individuals reach their work goal. For example, their plan may help them obtain:

- Supplies to start a business
- Tuition, fees, books and supplies needed for school or training
- Supported-employment services, including payments for a job coach
- Attendant care
- Equipment and tools to do the job
- Transportation to and from work
- Uniforms, special clothing and safety equipment.

If individuals want to try to work, and are receiving SSDI or SSI benefits, contact Social Security. Social Security can help them understand the rules that apply to your specific case and can guide them in returning to the work force. The **toll-free number is 1-800-772-1213**. When they call, they can ask for the pamphlet "Working While Disabled--How Social Security Can Help."

VETERANS ADMINISTRATION FUNDING ASSISTANCE

The Department of Veterans Affairs (VA) offers qualifying veterans vocational rehabilitation benefits including but not limited to supported employment. The vocational rehabilitation program helps service-disabled veterans achieve maximum independence in daily living and, to the maximum extent feasible, obtain and maintain suitable employment. If the veteran is found eligible for these benefits a VA counselor will help plan an individual program which includes service and financial assistance needed to carry out the program.

The benefits include:

1. education or training to qualify for employment;
2. educational, vocational and personal counseling;
3. tutorial assistance;
4. medical and dental treatment;
5. job counseling, planning, placement and adjustment to enable the veteran to maintain suitable employment; and
6. assistance to necessary to achieve maximum independence in daily living.

To qualify for VA vocational rehabilitation services and benefits a veteran needs to meet the following conditions:

1. The veteran must have a combined 10 percent compensable disability as a result of active service on or after September 16, 1940;
2. The veteran must have been or will be discharged, released, or retired from service under other than dishonorable conditions;
3. The VA determines that the veteran needs rehabilitation services because of an employment handicap; and
4. The veterans period of eligibility has not expired.

Even if individuals do not meet all of the eligibility criteria above they may still be eligible under certain circumstance to receive services to assist them to find and adjust to employment. If they are a veteran with a disability they should use the "Veteran Contacts" listed in this publication for assistance.

RURAL INSTITUTE ON DISABILITIES

The Montana University Affiliated Rural Institute on Disabilities (Rural Institute) is an interdisciplinary, university-sponsored organization that promotes the full participation in rural life by individuals of all ages with disabilities. The institute is organized to focus the traditional University of Montana activities of teaching, research and community service on solving problems experienced by people with all types of disabilities.

Institute staff work to:

- provide **information about rural issues** to the public, professionals and policy makers;
- help people with disabilities in rural areas get **quality social, education and health-care services**;
- increase the number and quality of **disability-service professionals and providers** in rural settings; and
- develop **new approaches** to meeting the challenges of living with a disability in rural areas.

The Rural Institute, located at The University of Montana, offers numerous programs of assistance to individuals with disabilities. The Rural Institute can be contacted **toll free 1-800-732-0323**. Or write The Rural Institute on Disabilities, 52 Corbin, The University of Montana, Missoula, Montana 59812.

VOCATIONAL REHABILITATION AND SUPPORTED EMPLOYMENT

Rehabilitation/Visual Services Division (VR)

The Rehabilitation/Visual Services Division (VR) is part of The Montana State Department of Social and Rehabilitation Services (SRS), and is the **lead agency** for the state's supported employment program. It is the **initial point of contact** for most individuals seeking supported employment services.

VR provides employment-related services to Montanans whose disability or disabilities prevent them from obtaining or keeping suitable employment. Eligibility for VR services is determined by the Rehabilitation Counselor. A person whose disability is considered to be the *most* severe may be eligible to receive supported employment. Once eligible, a VR client and his/her counselor work together to develop a plan for services. This plan is known as the Individual Written Rehabilitation Plan (IWRP).

In supported employment, VR can provide time-limited services (up to 18 months) during initial training. Through the IWRP, providers and funding sources are identified for extended services in supported employment.

The Federal and State governments match funds for time-limited services through Federal Title VI-C (Supported employment funding) and through Title 110 (general vocational rehabilitation funding) of the Rehabilitation Act of 1973. VR has access to limited long-term supported employment services through community rehabilitation programs using state-funded Vocational Rehabilitation Extended Employment (VREE) funding.

There are ten VR offices throughout Montana. In addition, VR Counselors travel to assigned out-lying areas, providing service coverage to all Montana counties. Supported employment services are typically procured through local service providers located in many communities throughout the state. (See "CONTACTS" for the location of the nearest VR counselor).

SUPPORTED EMPLOYMENT AND THE DEVELOPMENTAL DISABILITIES DIVISION

The Developmental Disabilities Division (DD) is a part of the Montana Department of Social and Rehabilitation Services. It provides services to individuals with disabling conditions due to mental retardation, epilepsy, or neurologically debilitating conditions, if the onset of the condition precedes the individual's 18th birthday. DD Training and Contract Managers can begin assisting individuals with their employment needs in a collaborative effort with special education services while the individual is still in high school.

DD Training and Contract Managers travel to assigned areas throughout the state providing service coverage to all Montana counties. There are five Regional Offices within the DD Division (See "DD CONTACTS").

The DD Division contracts through a network of local service providers in many of Montana's communities. These providers can offer flexible programs of employment-related services. These programs range from sheltered workshop activities to supported employment services.

Funding sources for employment assistance for individuals qualifying for DD services includes state and federal matching funds, grant programs, a Medicaid Waiver program (See **MEDICAID WAIVER**) and local fund-raising activities by private providers.

DD Training and Contract Managers collaborate with local schools, Rehabilitation/Visual Services Division, private service providers and other private and public agencies offering employment programs to qualifying individuals.

MEDICAID WAIVER PROGRAM FOR LONG-TERM SUPPORTED EMPLOYMENT

Montana's Home and Community Based Medicaid Waiver for Individuals with Developmental Disabilities

1. Individuals must be Medicaid eligible, and meet other program requirements, to qualify for the Developmental Disabilities (DD) Waiver.
2. Supported employment is one service provided under the Home and Community Based Services Waiver Program (HCBS) for individuals with developmental disabilities.
3. Individuals qualifying for supported employment under the DD Waiver must have been, at some point in their life, institutionalized in an Intermediate Care Facility for persons with Mental Retardation, (ICF/MR), or in a nursing facility. There are three ICF/MR's in Montana; The Montana Developmental Center (formerly the Boulder River School and Hospital), EastMont Human Services Center, and Orchard View (formerly Happy Acres).
4. Medicaid is always the payer of last resort. If an individual qualifies for any other supported employment program, particularly under the Rehabilitation/Visual Services Division, that individual would not be eligible for payment under the waiver. A person may be enrolled in the waiver program and also receive supported employment under vocational Rehabilitation/Visual Services Division.
5. Because this is a waiver program, Medicaid may limit or cease the operations of this program based on the availability of its budget. Like other Medicaid programs this is an approximate 70% - 30%, Federal/State split. One limiting factor is the availability of state general fund dollars used for the 30% match.
6. The application for the State waiver is about 150 pages of material. States may request a waiver of certain Medicaid requirements through a HCB Waiver. While a basic framework exists which applies to all HCB Waiver, each waiver contains individual characteristics and components.
7. Individuals who may be qualified for this program should contact their local S.R.S., Developmental Disabilities Division or their Department of Family Services Case Manager.

8. Individuals with Traumatic Brain Injury (TBI) may be eligible for services under the DD Waiver if they suffered their TBI injury prior to reaching 18 years of age. Individuals with a TBI may also be eligible for services under the Physically Disabled/Elderly Waiver, but this waiver does not include supported employment services.
9. Any additions to the total number of persons served, population targeted for services or the services provided under a Medicaid Waiver program must be approved by the State as well as the Federal Health Care Financing Administration, Division of Medicaid at the federal level.

MENTAL HEALTH SERVICES AND SUPPORTED EMPLOYMENT

Community Mental Health Providers

The Department of Corrections and Human Services has contracts with five regional community mental health centers located throughout the state. If individuals have questions concerning supported employment services provided through the community mental health system they may call the Governor's Office, Citizens Advocate **toll free - 1-800-332-2272** to locate the nearest mental health facility or call the nearest Regional Mental Health Center as listed below.

- Region 1 : Eastern Montana Community Mental Health Center
Frank Lane, Executive Director
2508 Wilson
P.O. Box 1530
Miles City, MT 59301 (232-0234)
- Region 2 : Golden Triangle Community Mental Health Center
Linda Hatch, Executive Director
Holiday Village Mall
P.O. Box 3089
Great Falls, MT 59403 (761-2100)
- Region 3 : Mental Health Center
Bob Ross, Executive Director
P.O. Box 219
1245 North 29th St.
Billings, MT 59103 (252-5658)
- Region 4 : Mental Health Services Inc.
Stuart Klein, Executive Director
512 Logan
Helena, MT 59601 (442-0640)
- Region 5 : Western Montana Community Mental Health Center
Paul Meyer, Executive Director
T-12 Fort Missoula
Missoula, MT 59801-7298 (728-6870)

THE MONTANA DEPARTMENT OF LABOR AND INDUSTRY

The Department of Labor and Industry (DLI) offers a variety of programs that are designed to assist individuals with disabilities in returning to work.

DLI offers numerous programs through Federal funding of the Jobs Training Partnership Act (JTPA) to persons with multi-barriers (people with disabilities, youth from economically disadvantaged families, Vietnam-Era Veterans, recipients of Supplemental Security Income (SSI), recipients of state or local General Assistance, ex-offenders, recipients of Aid to Families with Dependent Children (AFDC) and economically disadvantaged summer youth employees). These programs may include on the job training (OJT), vocational education, the purchase of tools, clothing or other essentials needed for successful employment.

DLI also offers employers certain advantages for hiring individuals with multi-barriers. Included in these programs is the Targeted Jobs Tax Credit program (TJTC). This program allows the employer a tax credit of 40 percent of the first year's salary of a multi-barrier employee not to exceed \$2,400. For example: the employer pays the individual \$6,000 in salary during the first year; the employer can take a \$2,400 tax credit ($6,000 \times 40\%$).

Qualification and registration for these programs can be determined and completed by scheduling an appointment with a programs specialist at a local Job Service.

UNIONS AND SUPPORTED EMPLOYMENT

Union Assistance

The Montana A.F.L.-C.I.O. offers workers who are disabled and displaced various assistance programs through the Project Challenge: Work Again Program. These offices can be reached by contacting the central office in Helena: Montana AFL-CIO, P.O. Box 1176, Helena, MT 59624, Telephone 442-1708, Attn: Jack Zink, Director; or by contacting the nearest regional office as noted below:

Anaconda	Frank Kankelborg, Coordinator 517 East Park Anaconda, MT 59722 (563-6002)
Billings	Becky Riedl, Coordinator Billings Labor Temple 530 S. 27th St. Billings, MT 59102 (252-8513)
Bozeman	Becky Riedl, Coordinator 422 East Mendenhall Bozeman, MT 59715 (587-9331)
Butte	Frank Kankelborg, Coordinator Blaine Community Center 975 North Main St. Butte, MT 59701 (723-4097)
Great Falls	Al Ekblad, Coordinator 1112 7th Street S. P.O. Box 1565 Great Falls, MT 59403 (761-8626)
Helena	Dan Newman, Coordinator Helena Labor Temple 110 N. Warren Helena, MT 59601 (449-2056)
Kalispell	Mary Kammeyer, Coordinator Kalispell Labor Temple 347 2nd Avenue W. Kalispell, MT 59901 (752-5895)

Libby John Starke, Coordinator
 Carpenters Hall
 803 Louisiana Ave.
 P.O. Box 1395
 Libby, MT 59923 (293-5029)

Missoula Wayne Shatto, Coordinator
 Missoula Labor Temple
 208 East Main
 P.O. Box 7845
 Missoula, MT 59807 (549-1341)

Troy George McGinnis, Coordinator
 P.O. Box 221
 Troy, MT 59935 (295-5695)

THE OFFICE OF PUBLIC INSTRUCTION AND SUPPORTED EMPLOYMENT

There are approximately 160,000 students enrolled in public schools in Montana, with over 18,000 currently receiving special education services. Over 7,000 of these students may qualify for post-school transition services. Resources for students graduating from high school and requiring additional support services are dwindling and complicating an already difficult problem. The Office of Public Instruction is working with a variety of other agencies to improve access, for students with disabilities, to scarce resources.

The Office of Public Instruction may address supported employment and other vocational needs by including Transition Planning in an eligible student's Individualized Educational Program (IEP). Transition services must be addressed for any student with disabilities no later than age 16, or by 14 for those students receiving special education services for at least 50 percent of the school day. These services must address the student's needs in instruction, community experiences and employment or other appropriate adult living services.

Special education funding or other grant funding is used to pay for supported employment services while students are still in school. These job coaching services may include work experience, job-shadowing and on-the-job-training. Public schools coordinate the services they provide with other agencies including the Developmental Disabilities Division and the Rehabilitation/Visual Services Division.

PRIVATE FUND RAISING, GRANTS AND FOUNDATIONS

Fund Raising and Development

The following information was obtained from an interview conducted with Mr. Glen Shepherd, Director of Community Relations and Development for Flathead Industries, Inc. in Kalispell, Montana on June 27, 1994.

Question: Glen can you tell us how a private non-profit entity begins a program of private fund-raising?

Answer: There are a number of steps everyone should go through before raising funds in their community.

Step one: Examine your current budget carefully. Ask yourself if you are saving all the money you can. Can you reduce some expenses or simply save five percent of costs? Are you effectively marketing your business or your products? Can you generate additional funds from your current operations?

If you believe you are saving all you can and generating all the revenue possible, then develop a plan or case statement which clearly defines why you need additional funding. Define how your dream or project intends to utilize these new funds. Work toward staff consensus for the project.

Step two: You should know your market, and how your organization is perceived. Hopefully, you have a positive image in the community to build upon and individuals who know your work and the valuable services you offer.

Step three: Know where your staff stands and ensure they support the project. They will have friends, organizations and associations they can personally contact and influence.

Find out if your board or advisory committee is supportive of the project. What role will they play? Expand the board or committee, if necessary, to include individuals from business, media, or other sectors of the community who can help you with this project.

Step four: Research other fund-raising projects being held in your community. Do not compete with similar projects. If the American Cancer Society, for instance holds a successful walk-run, try another project. Check the community calendar to make sure the proposed date for your event is not in competition with other large events. Develop a fund raiser that is unique and has broad community appeal. Encourage media coverage by involving them throughout the planning.

- Step five: Develop a constituent base. Find corporate or other sponsors who will help you from the start and help pay the initial costs of printing, advertising, etc. Make sure this sponsor base is large enough to ensure you will not suffer a loss.
- Step six: Start planning at least six months in advance. Use the media contacts you have developed. Distribute printed materials to the community. Advertise who is helping you with the project and give them considerable coverage. Let the public know what you are doing, who is helping you do it and more importantly, how the funds will be utilized.
- Step seven: Build on the success of the event. If one or two corporations helped you with the first successful project, three or more may want to help you the following year. Develop a constituent list. Know and acknowledge those who helped you with the first event. Maintain a list of who attended the first event and invite them to return. Keep them informed and involved in your program throughout the year.
- Step eight: If you find individuals or corporations are consistently attending or contributing to your fund raising activities, then develop them into permanent donors. Develop endowments and other activities that will allow those who are truly interested in you program to ensure its continued operation and success.
- Question: What are your opinions or "forecasts" for non-profits and fund-raising activities.
- Answer: There are over one million private, non-profit entities in the United States at this time. Federal, state and county dollars are being reduced in most cases. Large grants or endowments seldom reach Montana. Those entities who successfully market themselves will be successful. Those who do not market themselves successfully will receive a much smaller share of the available funds. Their important services will diminish. Non-profits must start thinking, acting and competing as for-profit businesses do. As per federal regulations for non-profits, any profits made will go back into the program to improve services and better achieve the mission. With this goal, why not strive to make a "profit"? Our consumers deserve top notch programs and services and it takes funds to provide them.

Grants and Foundations

Supported employment is a new and growing program. Because it offers employers quality employees, advances the opportunities for individuals with disabilities and reduces government costs, supported employment funding is frequently offered through federal and state grants and private foundations.

To begin your search, visit any of Montana's public libraries for grants and foundations information. You may also want to check with: The Rural Institute on Disabilities:

The University of Montana
Diana Spas, Librarian
52 Corbin Hall
Missoula, MT 59812
243-4620 or 1-800-732-0323

There are grants to address the needs of special disabilities groups. For example, the needs of individuals with developmental disabilities are addressed through grants from the Developmental Disabilities Planning and Advisory Council. To contact them write or call:

DDPAC
P.O. Box 526
111 N. Last Chance Gulch
Helena, MT 59624
444-1334

Writing a grant or foundation proposal can require a great deal of time and effort. Make sure the document you submit is precise to avoid missing out on funding because of a technical error. Federal grants will specifically identify the size and style of type that is acceptable, the exact date and time the document must be mailed or received and the maximum number of pages allowable. Any deviation from these requirements may disqualify your grant from consideration.

The Request for Proposals (generally referred to as the RFP) issued by the agency allocating grant or foundation funds will also point on specific areas of interest and a scoring procedure used to determine who receives the grants. Make sure you are aware of the areas of interest of the granting authority and prepare a document that closely follows the scoring procedure. For example, if there are 100 points total in the scoring procedure and 50 points are being awarded for a section dealing with supported employment, then make sure approximately 50% of your document deals with supported employment. If the RFP calls for research into disabilities among Native American who are survivors of traumatic brain injury then be sure your proposal deals with research, Native Americans and traumatic brain injury survivors. Grant proposals generally deal with new and creative ideas. However, you must always follow the guidelines proposed by the granting authority.

RESOURCES AND CONTACTS

MONTANA VOCATIONAL REHABILITATION CONTACTS

The State of Montana provides Vocational Rehabilitation Counselors to assist individuals with their supported employment needs. If individuals are not familiar with the office or who to contact, call the Governor's Office, Citizen's Advocate **toll free at 1-800-332-2272**.

The Department of Social and Rehabilitation Service, Rehabilitation/Visual Services Division can be contacted directly by calling the following:

ADMINISTRATION:

Helena, Bob Maffit 444-2590

LOCAL OFFICES:

Billings	248-4801
Miles City	232-0583
Butte	723-6537
Bozeman	587-0601
Helena	444-1710
Warm Springs	693-7158
Great Falls	727-7740
Havre	265-6933
Missoula	329-5400
Kalispell	755-5408

SOCIAL SECURITY CONTACT OFFICES
Toll Free Telephone 1-800-772-1213

Social Security Administration
 Martel Center, Ste.2-A
 220 W. Lamme
 Bozeman, MT 59715

Social Security Administration
 P.O. Box 712, 98 Hwy 2 East
 Glasgow, MT 59230

Social Security Administration
 College Park Plaza, Ste. 202
 P.O. Box 1072
 Havre, MT 59501

Social Security Administration
 5115 Highway 93 S.
 Missoula, MT 59801

Social Security Administration
 Ashley Square Mall
 1325 Hwy 2 West
 P.O. Box 7550
 Kalispell, MT 59904-0550

Social Security Administration
 11 South 7th St
 P.O. Box 640
 Miles City, MT 59301

Social Security Administration
 FOB, Drawer 10075
 301 S. Park, Room 138
 Helena, MT 59626

Social Security Administration
 2201 Harrison Ave.
 P.O. Box 3588
 Butte, MT 59702

Social Security Administration
 Federal Court House, Room 3412
 316 N. 26th St.
 Billings, MT 59101

Social Security Administration
 P.O. Box 2347
 119 1st Ave. N
 Great Falls, MT 59403

SOCIAL SECURITY SUPPORTED EMPLOYMENT CONTACT PEOPLE
(Work Incentive Liaison)

Billings and Miles City	Linda Jackson	657-6337
Butte	Paul Vang	723-9298
Great Falls, Glasgow	Dean Johnson	727-9551
and Havre		
Helena	Valarie Castle	449-5272
Bozeman	Ron Tewalt	586-2799
Missoula	John Garrity	251-5037
Kalispell	Judith Lyons	755-6150

VETERAN'S CONTACTS

Questions concerning eligibility for supported employment benefits provided by the Veterans Administration (VA) Vocational Rehabilitation Program can be answered directly by calling the VA **toll free 1-800-827-1000**. The Veterans Administration Vocational Rehabilitation Program is administered in Montana by Fred Jense (442-6410).

The State of Montana also provides service officer visits on a monthly basis to most of Montana's communities. These service officers can assist with the forms and filing requirements of the Veterans Administration. The telephone numbers of the Montana Veterans Affairs Service Officers are as follows:

Helena	Ruddy R. Reilly	442-6410 (ext. 7720)
Kalispell	Lee Barta	755-3795
Miles City	Rod Boyer	232-3060
Butte	Art Tyler	723-8932
Missoula	Len Leibinger	542-2501
Bozeman		586-2249
Billings	Cheryl Heald	652-4624
Great Falls	Whales Davis	452-2265

DEVELOPMENTAL DISABILITIES DIVISION

The Department of Social and Rehabilitative Services, Developmental Disabilities Division; provides services to individuals throughout the state. Direct questions concerning supported employment services provided through the Developmental Disabilities Division in your area to the Governor's Office Citizen Advocate **toll free 1-800-332-2272** to locate the nearest office, or call one of the Regional Developmental Disabilities Offices as noted below:

Region 1: DDD Regional Office
Dain Christianson, Regional Manager
Box 472
Glasgow, MT 59230
228-8624

Miles City DDD District Office
Novelene Doucette, Training &
Contract Manager
P.O.Box 880
Miles City, MT 59301
232-2595

Region 2: DDD Regional Office
Dale Boespflug, Regional Manager
1824 10th Av. S.
Suite 10 B
Great Falls, MT 59405
727-7740

Region 3: DDD Regional Office
Gary Pagnotta, Regional Manager
1211 Grand Av.
Billings, MT 59102
248-4801

Region 4: DDD Regional Office
Larry Lovelace, Regional Manager
3075 N. Montana Av.
Helena, MT 59620
444-1714

Bozeman DDD, Satellite Office
Brad Johnson, Training & Contract
Officer
P.O. Box 3066
Bozeman, MT 59772
587-6066

Butte DDD Satellite Office
Suzanne Matosich, Training &
Contract Manager
700 Casey, Suite A
Butte, MT 59701
496-4922

Region 5: DDD Regional Office
Ted Spas, Regional Manager
1610 S. 3rd. W.
Missoula, MT 59801
329-5425

Kalispell DDD Satellite Office
Judi Allen, Training & Contract
Manager
P.O.Box 2357
Kalispell, MT 59903-2357
755-5409

CLIENT ASSISTANCE PROGRAM

The Client Assistance Program (CAP) is a federally funded program offering assistance to individuals who are seeking or receiving services under the Vocational Rehabilitation Act of 1973, as amended in 1992. The services include information/referral, advisory/interpretational, mediation/negotiation, and the formal appeals process.

The services of CAP are free and available throughout the state. For additional information, write or call:

CAP
P.O. Box 1680
Helena, MT 59624
444-3889
1-800-245-4743

GLOSSARY of TERMS

SUPPORTED EMPLOYMENT is ...

- competitive work in integrated work settings;
- for persons with the MOST severe disabilities;
- for whom competitive employment has not traditionally occurred;
- or for whom competitive employment has been interrupted or intermittent as a result of a severe disability; and
- who, because of the severity of their disability, need intensive support services; or
- extended services in order to perform such work.
- This term also includes transitional employment for persons with the most severe disabilities due to mental illness.

SUPPORTED EMPLOYMENT SERVICES are defined in this statute as ongoing support services and other appropriate services, for individuals with the MOST severe disabilities. They are ...

- any service(s) that assist(s) an individual in entering or maintain integrated, competitive employment;
- based on the needs of the eligible individual, as specified in an IWRP; and
- provided by the designated state unit for a period of time not to exceed 18 months; or
- under special circumstances, may be extended beyond 18 months if the eligible individual and the rehabilitation counselor jointly agree to extend the time in order to achieve the rehabilitation objectives in the IWRP.

ONGOING SUPPORT SERVICES are provided to individuals with the most severe disabilities and ...

- occur **at least twice monthly** to assess the employment situation at the job site; or **at the request of the client, off site;**
- and based on the assessment, provide for the coordination or provision of intensive services, at or away from the job site, that are needed to maintain employment stability; and
- may include such things as a supplementary assessment; intensive job-site training; job development and placement; social skills training; observation or supervision of the individual; contact with the employers, individual, parents, family members, or advocates; facilitation of natural supports; any other service identified in Section 103; or a service similar to another service described in this subparagraph.

EXTENDED SERVICES include ongoing support services and other appropriate services needed to support and maintain an individual in supported employment. They are ...

- any service(s) needed to support an individual in maintaining integrated, competitive employment;
- provided by any appropriate resource such as a state agency, a nonprofit private agency, or an employer after the individual has transitioned from support provided by the designated state vocational rehabilitation unit; based on the needs of an eligible individual as specified in an IWRP which must include a statement of the source of the extended services.
- If it is not possible to identify such a source, a statement may be included describing the basis "*for concluding that there is a reasonable expectation that such sources will become available.*" Extended services may include natural supports.
[Sec.6359b)(6)(C)(iii)].



The University of
Montana